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Virtual phone systems
to make your business fly

C-VOX SET-UP & USER MANUAL

This guide will show you how to make the most of your C-Vox hosted PABX system

Table of Contents

1. INTRODUCTION TO C-VOX 3

1.1 C- VOX FEATURES 3
1.2 HOW DOES A C-VOX PHONE SYSTEM FIT TOGETHER? 3

2. C-VOX SET-UP 4

2.1 PLANNING YOUR PHONE SYSTEM 4
Set Up 4
Initial Planning 4
Break Down 5
Admin options 5
2.2 HOW TO SET UP YOUR SYSTEM 5
Users 7
Ring Groups 9
Follow Me 11
Time Conditions 13
Digital Receptionist 16
Inbound Route 19
System Recordings 22
On Hold Music 22
Queues 24
2.3 A WORKING EXAMPLE 28
Steve and Helen 28
Planning the Phone System 28
What do they need? 30
Getting Specific 30
Setting It Up 31
Level Three 32
Level Two: 34
Level One 37

1. Introduction to C-Vox

C-Vox is a hosted PBX phone system, and as such has all the functions of a traditional high-end PBX system without all the physical hardware. Because it's hosted, it's easy to set up or remove features as you need them. You just need to imagine exactly what you want your calls to do, and then decide the best mix of C-Vox features to do achieve it.

This guide will walk you through that process so you can create a PBX system that will be ideally suited to your business.

1.1 C- Vox Features

C- Vox has a large selection of features and functions. You can find the complete list on the support page of our website, or by visiting http://www.conversant.co.nz/products-and-services.

The set up and administration of your system can be managed on line at http://c-vox-02.conversant.co.nz.

You will need your **User Name** and **Login** to access this area (these will be supplied to you by Conversant). From here administrators can manage the entire phone system and, where appropriate, allow or limit other users' ability to manage system functions.

1.2 How does a C-Vox Phone System Fit Together?

To ensure C-Vox is as powerful, flexible and easy to use as possible, we've broken call management down into single components so you can set each of them up individually, and then put them together in whatever order suits your business needs.

These are the components you can manage to build your system:

1. INBOUND ROUTE – this is the destination number for inbound calls, or the number from which the call was made (originating number), which will be subject to the call management rules (CMR). Each inbound route will have its own CMR.
2. TIME CONDITIONS – for setting CMR based on times or dates. Different ring groups or IVRs will be activated according to whether or not time conditions have been met.
3. DIGITAL RECEPTIONIST – also known as IVR or automated attendant, it can play system recording to callers, giving them various options. Each option will send a call to a certain ring group.
4. RING GROUP - a combination of one or more extensions, phone numbers, voicemail boxes, IVR's or conference calling rooms which will be involved when appropriate conditions have been met.
5. QUEUE – determines how people on hold are dealt with
6. FOLLOW ME – defines how to deal with calls sent to the extension which are not answered.
7. VOICEMAIL – records a message from a caller and sends a copy to an email box of your choice.
8. EXTENSIONS – these are numbers which relate to individual users. The PABX will send calls to these numbers according to the **ring g**roup they are in.
9. DEVICES – these are used to connect people to their extensions, and can be one or a combination of desktop VOIP phones, analogue phones with adapters, software on a laptop or on a mobile phone.

2. C-Vox Set-up

This section covers the initial set up of your C-Vox phone system.

When planning your PABX, it's easiest to imagine the system beginning with what happens to inbound calls (top-down).

However, since each basic component is combined to make up the next, starting with extensions, when setting up the call management rules you need to start with the extensions (item 8 above) and create the inbound route (item 1 above) last.

2.1 Planning Your Phone System

It's important to spend time planning out what you want your system to do. We have supplied a worked example (Section 2.3 Worked Example) to take you through the process of creating your system from concept through to completion. We recommend you read through this prior to planning your system.

Using a flow chart to represent your system visually instead of writing it down is a helpful way of sorting out what you're after. Plan your system in three levels: (**Refer 2.3.1 Planning the phone system**)

1. Where will inbound calls come into your system from (Phone numbers)?
2. When an inbound call comes in how will it be processed by the phone system?
3. Who's in the system (users) and once a call is in the system, where do you want it to go?

Set Up

Get a pencil/pen and paper and following the instructions below OR print out the table supplied in the appendix.

Divide the paper into THREE vertical columns. Label the left column Level One, the middle column Level Two and the right column Level Three.

Initial Planning

1. In the area labeled **Level One,** write down all of the destination and originating phone numbers you wish to be included in your Phone System. These are your **Inbound Routes**.
2. In the area labeled **Level Two** write down how you want the calls relating to each of the numbers you just wrote down to be handled. You may want certain numbers to be directed to reception, another straight to a certain department or possibly directly to one person (e.g. a DDI).
3. In **Level Two** include any additional features you might want callers to have or experience e.g. hold music, welcome messages, messages while on hold, the ability to dial an individual staff member's extension, handle calls differently outside business hours. For a complete list of the available features, visit the Products page of our website and look at the C-Vox Benefits & Features Page.
4. In the area labeled **Level 3,** list all of the users/extensions you are going to have in your phone system.
5. Next, in **Level 3** write down how you want the incoming calls directed to these users/extensions to be handled. e.g. you may have a call center and you would like calls to be direct to a group of

users/extensions rather than just one. For a full list of the available features refer to the C-Vox Benefits & Features page found under "Support" on the Conversant website.

6. At this point, create a visual flow chart. This will define the three different levels, list all the numbers/inbound routes, users/extensions and other functions you want in your system. It will also show the flow of calls as lines between the different elements of your system.

Break Down

1. Now break down the contents of each Level under the headings **Level 1, Level 2, Level 3.** This will create a detailed list of all the components of your desired system.
2. Using this list, define how to set up each of the components of your system e.g. Purchase three phone numbers (Inbound Routes), create 7 extensions, upload a message for callers, create an automated receptionist to direct calls....**Keep these action items in the levels they relate to.**
3. Contact Conversant to arrange the numbers (Inbound Routes) and the number of users/extensions you require. You will also need to request your Login and password for the C-Vox administration menu.
4. Finally you will need to know which of the administration menu options to use in order to set up the individual parts of your system.

Admin options

1. Below is a list of the Admin menu options and a description of their functions:
2. DISA - You do not need to use this menu
3. Digital Receptionist – An automated receptionist (or IVR) which can play messages and, according to caller input, direct calls.
4. Follow Me - Define how calls made to your phone are dealt with if you can't answer on your normal phone.
5. Inbound Routes - The destination or originating phone numbers which reach your business
6. On Hold Music - The music callers hear while on hold
7. Queues - Manage how waiting callers are handled
8. Ring Groups – one or more components (extensions, voicemail box, an IVR) to which calls are sent according to preset conditions.
9. System Recordings - messages played to callers
10. Time Conditions – to set different call management rules based on time, day or month
11. Users – or extensions connect people to your system.

2.2 How to set up your system

When reading these instructions we suggest that you log into the Administration menu so you can use the features as we discuss them.

PLEASE NOTE: the level of access to different menus may depend on whether you are an administrator or a general user.

In the previous section (2.1 Planning Your Phone System), you planned from the inbound routes (phone numbers) through to the user/extension which will receive the call, or top-down. When setting up the system

you will do the reverse, starting from the user/extension and finishing with the Inbound Routes (phone numbers).

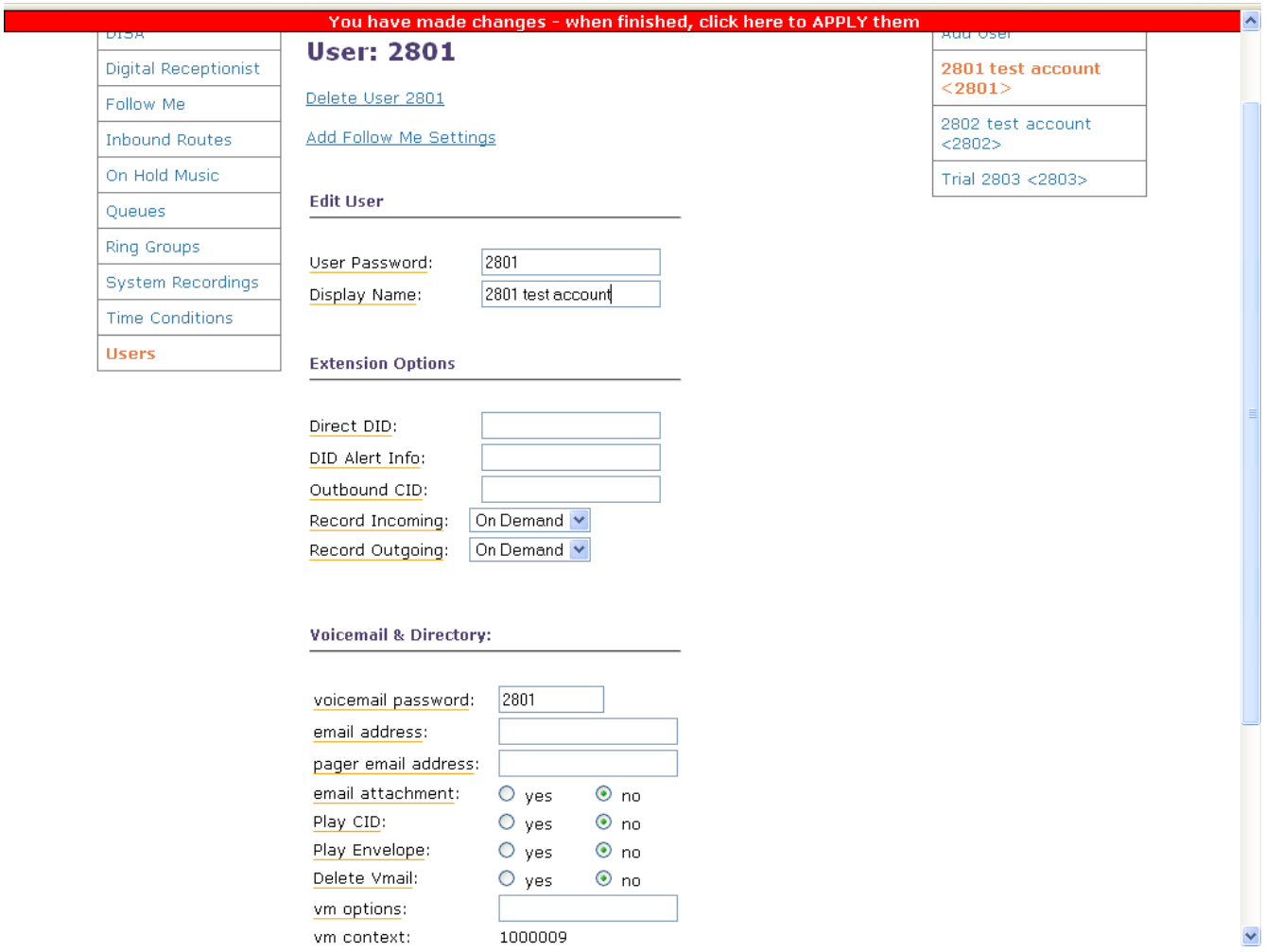
Set up your system in this order:	**Detailed set up instructions for each can be found in the following sections:**
Extensions	2.2.1. Users/extensions
Upload System recordings	2.2.2. System recordings
Upload On Hold Music	2.2.3. On hold music
Time Conditions	2.2.4. Time conditions
Follow me	2.2.5. Follow me
Conference call rooms	2.2.6. Conference calling
Ring Groups	2.2.7. Ring groups
Queues	2.2.8. Queues
Digital Receptionist (IVR)	2.2.9. Digital receptionist

Users

Users represent the people or extensions in your business, with a voice mail box and a four-digit extension number. Setting up users will allow you to direct calls to the places you want them to go.

Selecting the **Users** option from the left hand menu will bring up the screen below:

Moving your cursor over the options underlined in orange will bring up a short description of the corresponding field. This will help you decide which options to select to get the desired outcome.



The following table gives a short description of the fields and other menu options used for modifying users:

Function	Options	Action
	Delete User [user #]	Select this option if you wish to delete the user from the system
	Add Follow Me Settings	Selecting this option will take you to the Follow Me menu for this user. See the "2.2.5 Follow me instructions" for more information.
Edit user	User Password	Enter the user's password. This password will be required when a user wants to associate their phone/device with their extension.
	Display Name	Selecting this field will allow you to add the user's name to their extension number. E.g. Helen
Extension options	Direct DID:	You will not need to edit this field
	DID Alert Info	You will not need to edit this field
	Outbound CID	You will not need to edit this field.
	Record Incoming	Choose whether to record incoming calls.
	Record Outgoing	Choose whether to record outgoing calls
Voicemail & Directory	Voice mail password	Enter the password this user requires to access their voice mail.
	Email address	Enter the email address to which email notification is sent when this user receives voicemail. (Note: if you enter an address here you will need to select YES in the email attachment option below).
	Pager email attachment	You will not need to edit this field.
	Email attachment	Select yes if you wish voice messages to be attached to the email notifications sent to your email. (Note: if you select this option you will need to include an email address in the email address field above).
	Play CID	select YES if you wish the number of the caller to be read out when the message is played
	Play Envelope	Select yes if you wish the message date and time to be read out when the message is played
	Delete Voice-mail (VM)	Select yes if you wish emailed messages to be deleted from the server.
	VM options	You will not need to edit this field
	VM context	You will not need to edit this field

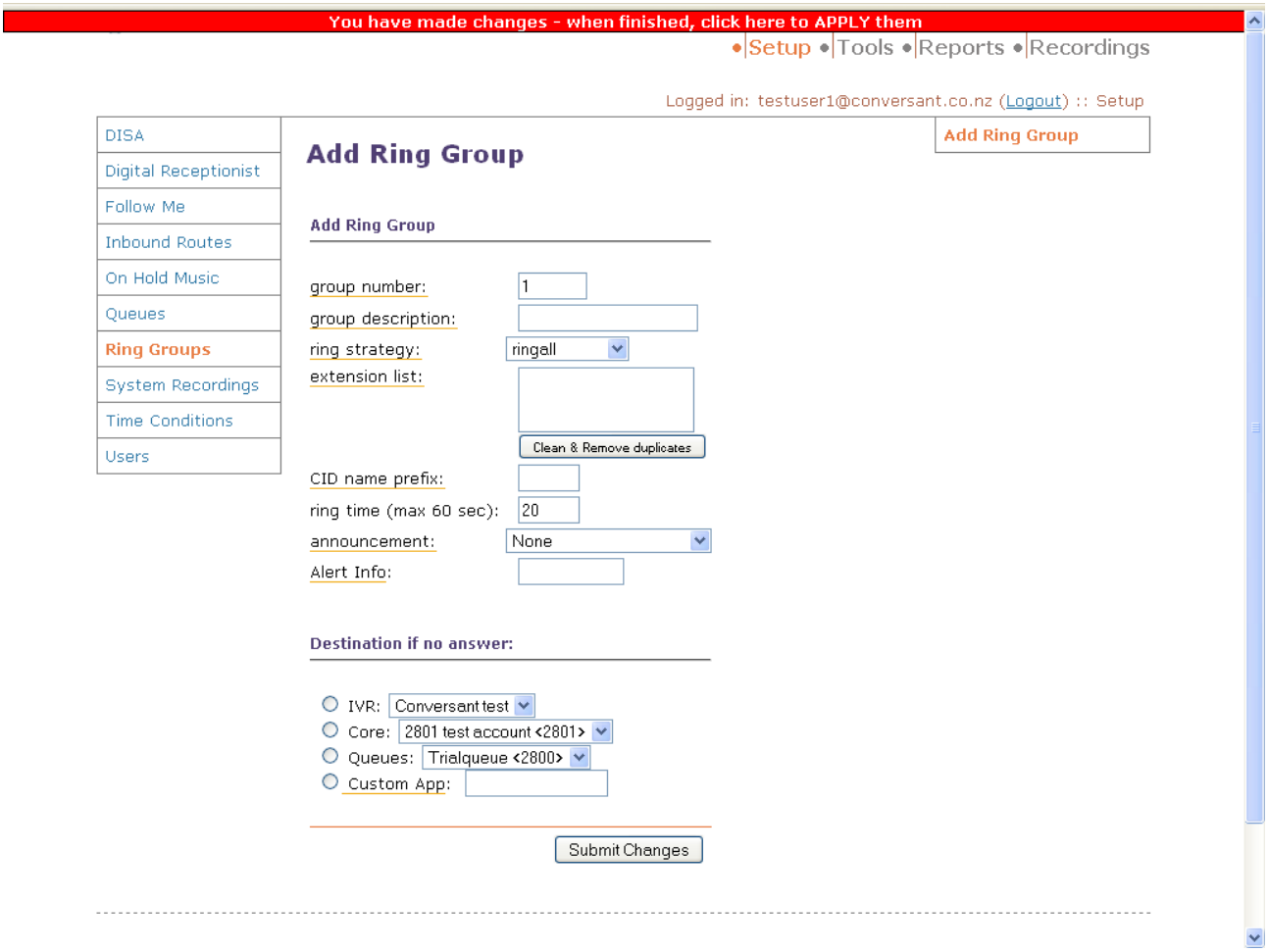
Ring Groups

Ring groups are a set of instructions for your phone system created by your systems administrator to manage how incoming (inbound) calls are dealt with and distributed to staff.

Through this function you can group people in your business together. An example of this might be a five person sales team. A customer will call in and from an automated menu select "1 for sales". This would then direct that customer to Ring Group # 1 of which the five sales staff belongs.

Selecting the Ring Groups option in the left menu should bring up the screen below.

Moving your cursor over the options underlined in orange will bring up a short description of the corresponding field.



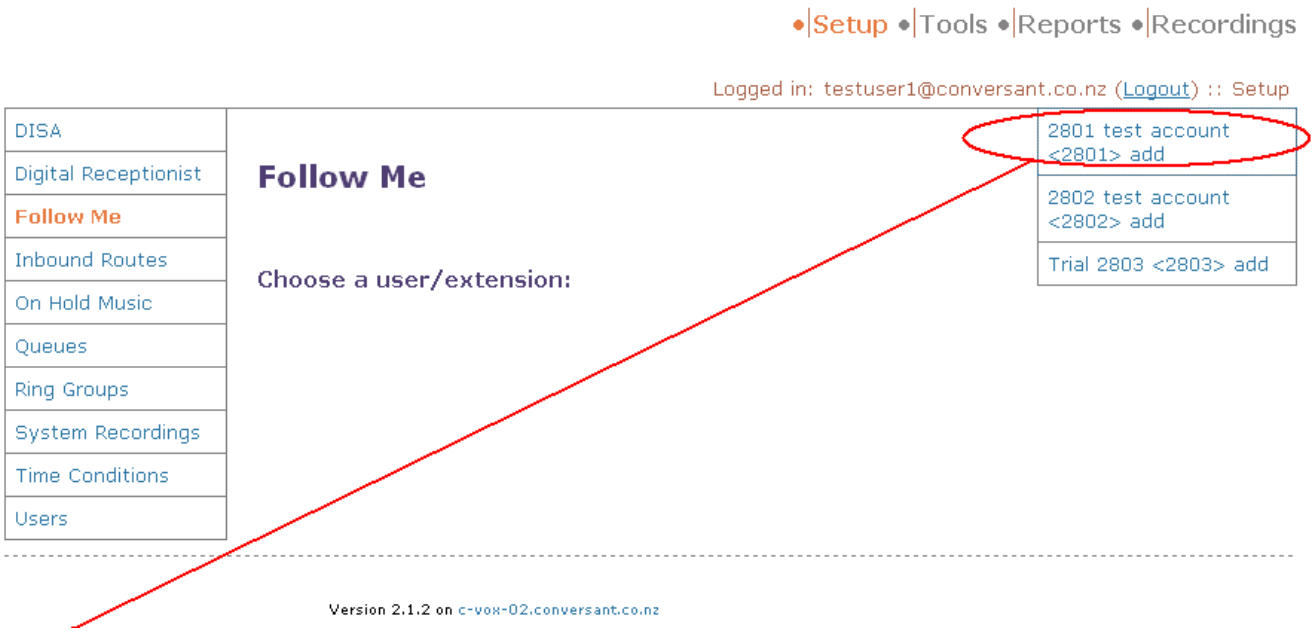
The following is a short description of the fields and other menu options used for modifying ring groups:

Function	Options	Action
Ring Groups	Group Number	A 4 digit number which represents a specific Ring Group
	Group Description	Usually your company name plus the name of the department or person the ring group belongs to.
	Ring Strategy	This option allows you to tell the system how to ring through the extensions in your extension list (Extension List Below). Ring All: Rings all the listed extensions which are not busy. Hunt: Rings each extension one after another Memory Hunt: Rings the 1st extension then the 1st & 2nd extension the 1st,2nd & 3rd extension etc.
	Extension List:	All of the phones listed by their extension numbers which this ring group will call. Numbers will be called in the order they appear on the list. You may also include cellphone and outside land line numbers in this list. Ensure their numbers are not entered with# at the end. (Note: You must set up Users before you can add extensions to the list, Refer to 2.2.9 Users menu and instructions)
	CID Name Prefix	Do not modify
	Ring Time	How long you wish phones to ring for before moving to the next number in the list. We suggest no more than 10seconds.
	Announcements	If you wish callers to listen to an announcement specific to the call group while waiting for their call to be answered this is the area you select it from. (Note: Announcements can be up loaded in the System Recordings menu, for more information refer to 2.2.6 System Recordings.)
	Alert Info	Do not modify
	Destination if no answer	This section of the menu is where you create the settings for handling calls which are not picked up by any of the phones in your call list.
	Time Condition	Select this option if you want your system to behave differently at different times. (Note: The time condition must be set up already for this option to appear. Refer Section 2.2.3 Time Condition for more information).
	Ring Groups	Select this option if you wish to direct callers to a ring group that can call a group of people. (Note: A Ring Group must be set up already for this option to appear. Refer to Section 2.2.1 Ring Groups for more information).
	IVR (Digital Receptionist)	If this option is selected, unanswered calls will be looped back into your Digital Receptions main menu. (Note: You will need to have set up a Digital Receptionist up before this option will appear. For more Info refer to Section 2.2.4 Digital Receptionist)
	Core	Select this option if you wish to send callers to voice mail or to go straight to a user's phone. Selecting the voice mail account or user can be done from the drop down menu to the right of this option.
	Queues	Selecting this option will send unanswered calls to a Queue where callers are placed on hold until someone is available to take the call. (Note: To set up a queue or for more information refer to the Queue menu and instructions 2.2.8 Queues).
	Custom App	Do not modify

Follow Me

Follow me is the menu you will select when to want to specify what happens to unanswered calls directed to a specific user/extension, e.g. if a caller had reached your Digital Receptionist (IVR) and then direct dialed your extension but you were unable to answer the phone.

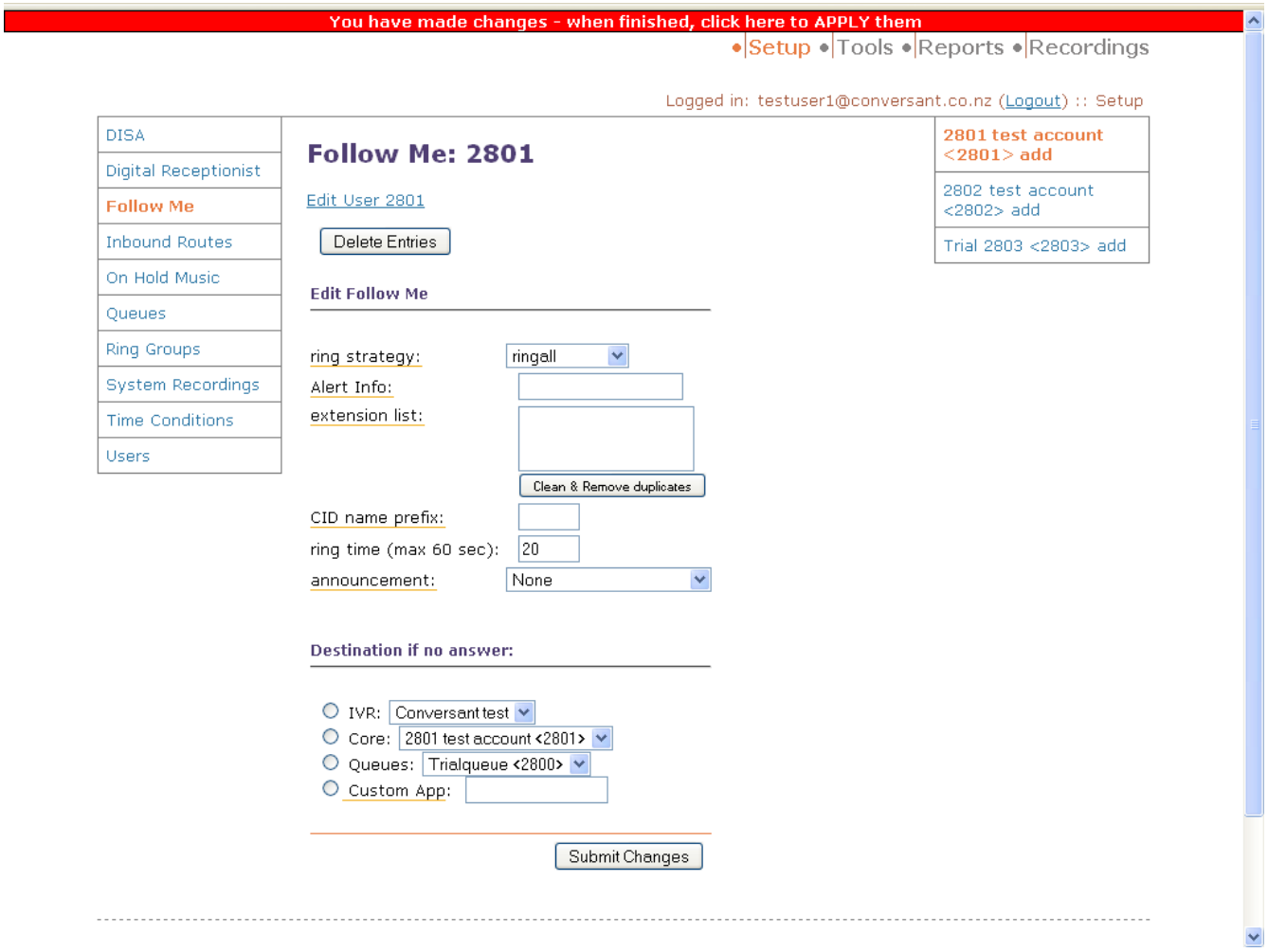
Selecting the Follow Me menu will bring up the screen below:



At this point you will select the Extension/ Person for whom you want to set up **Follow Me** by selecting their extension number listed in the menu in the top right of your screen.

Selecting this option will bring up the screen on the following page:

Moving your cursor over the options under lined in orange will bring up a short description of the corresponding field.


You have made changes - when finished, click here to APPLY them
Setup
Tools
Reports
Recordings
Logged in: testuser1@conversant.co.nz (Logout) :: Setup
DISA
Digital Receptionist
Follow Me
Inbound Routes
On Hold Music
Queues
Ring Groups
System Recordings
Time Conditions
Users
Follow Me: 2801
Edit User 2801
Delete Entries
Edit Follow Me
ring strategy:
ringall
Alert Info:
extension list:
Clean & Remove duplicates
CID name prefix:
ring time (max 60 sec):
20
announcement:
None
Destination if no answer:
IVR:
Conversant test
Core:
2801 test account <2801>
Queues:
Trialqueue <2800>
Custom App:
Submit Changes
2801 test account <2801> add
2802 test account <2802> add
Trial 2803 <2803> add

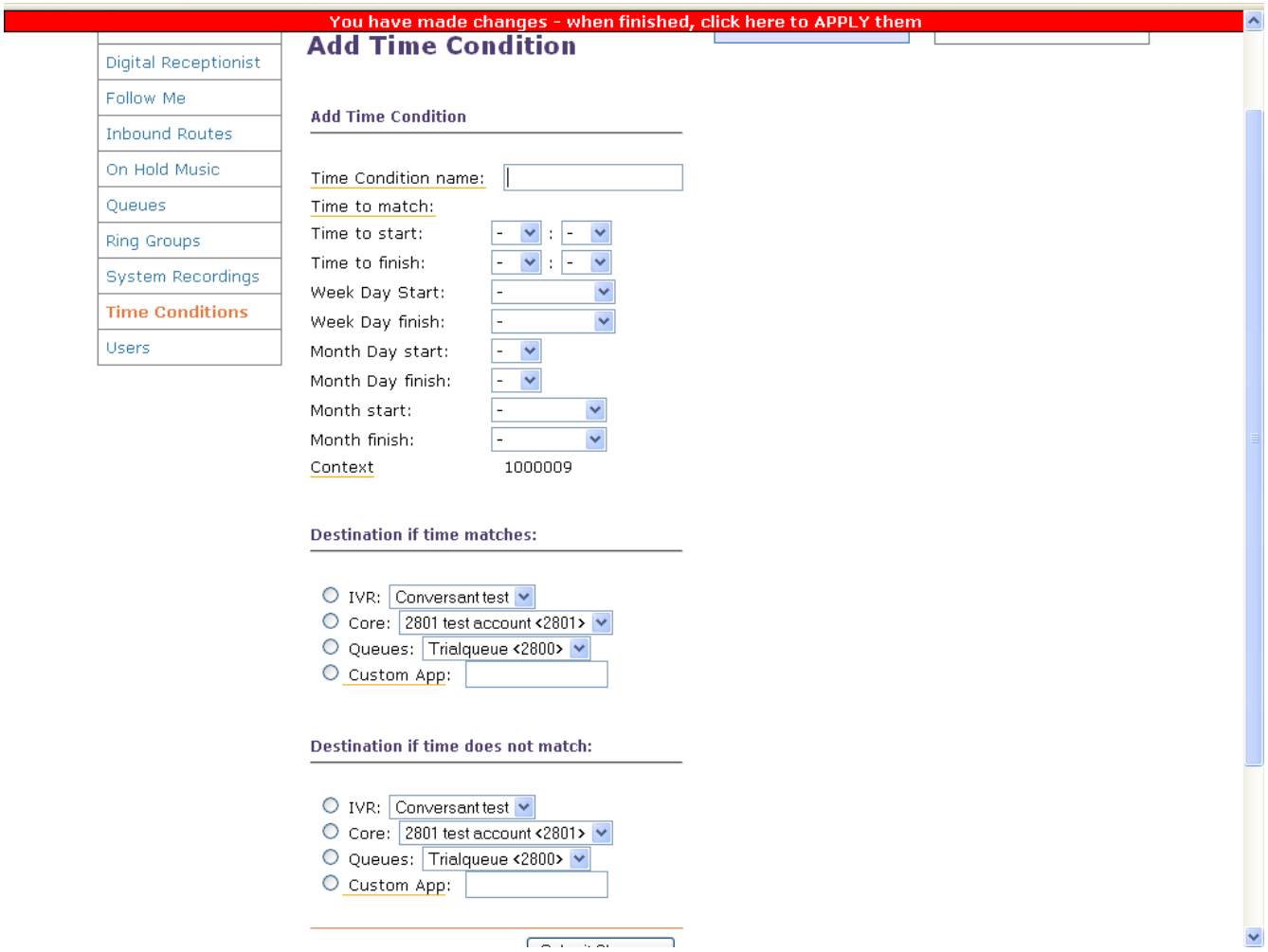
The following is a short description of the fields and other menu options used for modifying Follow Me:

Function	Options	Action
Follow me	Delete Entries	Select this to clear the options you have selected for this follow me
	Ring Strategy	This option allows you to tell the system how to ring through the extensions in your extension list (Extension List Below). Ring All: Rings all the listed extensions which are not busy. Hunt: Rings each extension one after another Memory Hunt: Rings the 1st extension then the 1st & 2nd extension the 1st,2nd & 3rd extension etc.
	Extension List:	All of the phones listed by their extension numbers which this Follow Me will call. Numbers will be called in the order they appear on the list. You may also include cellphone and outside land line numbers in this list. Ensure numbers are not entered with# at the end. (Note: You must have set up Users before you can add extensions to the list, Refer to 2.3.9 Users menu and instructions)
	CID Name Prefix	Do not modify
	Ring Time	How long you wish phones to ring for before moving to the next number in the list. We suggest no more than 10seconds.
	Announcements	If you wish callers to listen to an announcement specific to the call group while waiting for their call to be answered this is the area you select it from. (Note: Announcements can be up loaded in the System Recordings menu, for more information refers to 2.2.6 System Recordings.)
	Alert Info	Do not modify
	Destination if no answer	This section of the menu is where you create the settings for handling calls which are not picked up by any of the phones in your call list.
	Time Condition	Select this option if you want your system to behave differently at different times. (Note: The time condition must be set up already for this option to appear. Refer Section 2.2.3 Time Condition for more information).
	Ring Groups	Select this option if you wish to direct callers to a ring group that can call a group of people. (Note: A Ring Group must be set up already for this option to appear. Refer to Section 2.2.1 Ring Groups for more information).
	IVR (Digital Receptionist)	If this option is selected, unanswered calls will be looped back into your Digital Receptions main menu. (Note: You will need to have set up a Digital Receptionist up before this option will appear. For more Info refer to Section 2.2.4 Digital Receptionist)
	Core	Select this option if you wish to send callers to voice mail or to go straight to a user's phone. Selecting the voice mail account or user can be done from the drop down menu to the right of this option.
	Queues	Selecting this option will send unanswered calls to a Queue where callers are placed on hold until someone is available to take the call. (Note: To set up a queue or for more information refer to the Queue menu and instructions 2.2.8 Queues).
	Custom App	Do not modify
	Submit Changes	Select this option to save the changes you have made

Time Conditions

Time conditions allow you to instruct your system to behave differently according to specified time parameters. E.g. outside business hours, during holidays or during any other time.

When you select the time conditions menu the screen below will appear:



Moving your cursor over the options under lined in orange will bring up a short description of the corresponding field. The following is a short description of the fields and other menu options used for modifying time conditions:

Adding Time Conditions

Time Condition name	This field will allow you to name the time condition. We suggest this format [Your company name] [Business Hours]. e.g. Time condition: Conversant normal hours.
Time to Match	These options allow you to set the time parameters of your time condition.
Destination if time matches	Specify where the system will direct calls when the time condition is met.
Destination if time does not match	Specify where the system will direct the call when the time condition is not met.

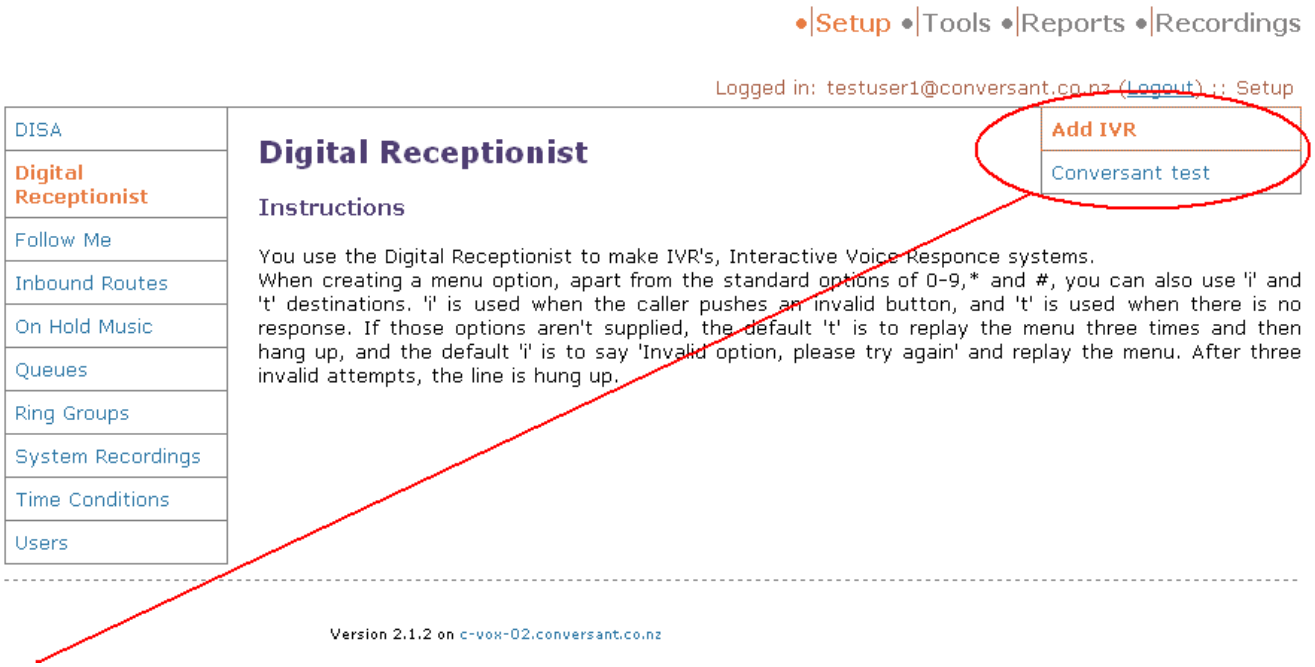
The same options as with the previous sections apply.

Add Time Conditions	Time Condition	Select this option if you want your system to behave differently at different times. (Note: The time condition must be set up already for this option to appear. Refer Section 2.2.3 Time Condition for more information).
	Ring Groups	Select this option if you wish to direct callers to a ring group that can call a group of people. (Note: A Ring Group must be set up already for this option to appear. Refer to Section 2.2.1 Ring Groups for more information).
	IVR (Digital Receptionist)	If this option is selected, unanswered calls will be looped back into your Digital Receptions main menu. (Note: You will need to have set up a Digital Receptionist up before this option will appear. For more Info refer to Section 2.2.4 Digital Receptionist)
	Core	Select this option if you wish to send callers to voice mail or to go straight to a user's phone. Selecting the voice mail account or user can be done from the drop down menu to the right of this option.
	Queues	Selecting this option will send unanswered calls to a Queue where callers are placed on hold until someone is available to take the call. (Note: To set up a queue or for more information refer to the Queue menu and instructions 2.2.8 Queues).
	Custom App	Do not modify
	Submit Changes	Select this option to save the changes you have made

Digital Receptionist

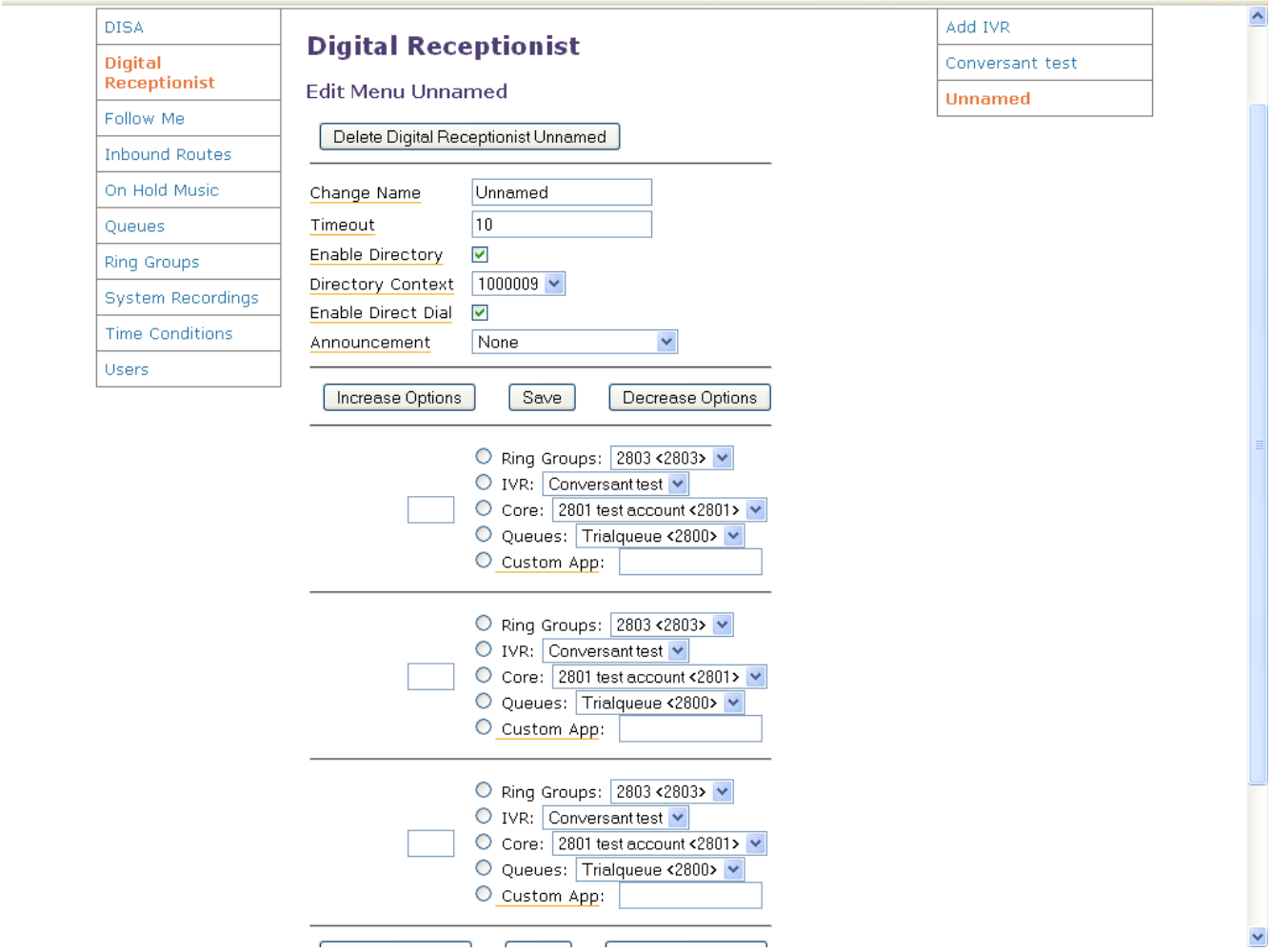
The Digital Receptionist menu lets you set up your automated attendant (or IVR) to answer and distribute calls automatically. This allows callers to listen to a series of options and choose the most appropriate one.

When you select this menu your screen will look like this:


•|Setup •|Tools •|Reports •|Recordings
Logged in: testuser1@conversant.co.nz (Logout) :: Setup
DISA
Digital Receptionist
Follow Me
Inbound Routes
On Hold Music
Queues
Ring Groups
System Recordings
Time Conditions
Users
Digital Receptionist
Instructions
You use the Digital Receptionist to make IVR's, Interactive Voice Responce systems.
When creating a menu option, apart from the standard options of 0-9,* and #, you can also use 'i' and 't' destinations. 'i' is used when the caller pushes an invalid button, and 't' is used when there is no response. If those options aren't supplied, the default 't' is to replay the menu three times and then hang up, and the default 'i' is to say 'Invalid option, please try again' and replay the menu. After three invalid attempts, the line is hung up.
Add IVR
Conversant test
Version 2.1.2 on c-vox-02.conversant.co.nz

In the top right corner you will see **ADD IVR.** Selecting **Add IVR** will take you to the set up menu. Any existing IVRs you have previously set up will appear below "Add IVR" (Conversant test in this example)

Select ADD IVR to take you to the following menu:



Moving your cursor over the options underlined in orange will bring up a short description of the corresponding field.

The following is a short description of the fields and other menu options used for modifying IVRs:

Delete Digital Receptionist [Name]	Select this option if you wish to delete the Digital Receptionist (IVR) you have selected from your phone system.
Change Name:	Insert the name of this IVR here which will help you identify it in the future.
Timeout ('t' option):	This option sets how many seconds the system will wait for a response from the caller after the menu has been played before replaying the menu. By default after the menu has been played 3 times with no response the call will be dropped automatically.
Enable Directory:	Select this option if you wish to give callers the option of pressing # to access your businesses phone directory (your employee's extensions).
Directory Context	This is your customer number and requires no changes.
Enable Direct Dial	Selecting this option will allow callers to directly dial your employees' extensions by entering their extension number.
Announcements	This option selects the message played to callers when they reach the IVR (Note: this message must include information relating to which key callers should press. E.g. dial 1 for sales).
Increase Options	Select this option if you wish to add another option to the menu e.g. dial 1 for sales, 2 for support, and 3 for service. Select increase options if you want to add a 4th or a 5th option.
Save	Select to save your changes
Decrease Options	Select this option if you wish to reduce the number of options available to callers. E.g. only offer one option, dial 1 for sales.
Left column	The box to the left of the listed options is where you enter the number callers will dial for a certain option. E.g. dial 1 for sales. (Note: These numbers must match those listed in the announcement played to callers by the IVR).
Time Condition	Select this option if you want your system to behave differently at different times. (Note: The time condition must be set up already for this option to appear. Refer Section 2.2.3 Time Condition for more information).
Ring Groups	Select this option if you wish to direct callers to a ring group that can call a group of people. (Note: A Ring Group must be set up already for this option to appear. Refer to Section 2.2.1 Ring Groups for more information).
IVR (Digital Receptionist)	If this option is selected, unanswered calls will be looped back into your Digital Receptions main menu. (Note: You will need to have set up a Digital Receptionist up before this option will appear. For more Info refer to Section 2.2.4 Digital Receptionist)
Core	Select this option if you wish to send callers to voice mail or to go straight to a user's phone. Selecting the voice mail account or user can be done from the drop down menu to the right of this option.
Queues	Selecting this option will send unanswered calls to a Queue where callers are placed on hold until someone is available to take the call. (Note: To set up a queue or for more information refer to the Queue menu and instructions 2.2.8 Queues).
Custom App	Do not modify

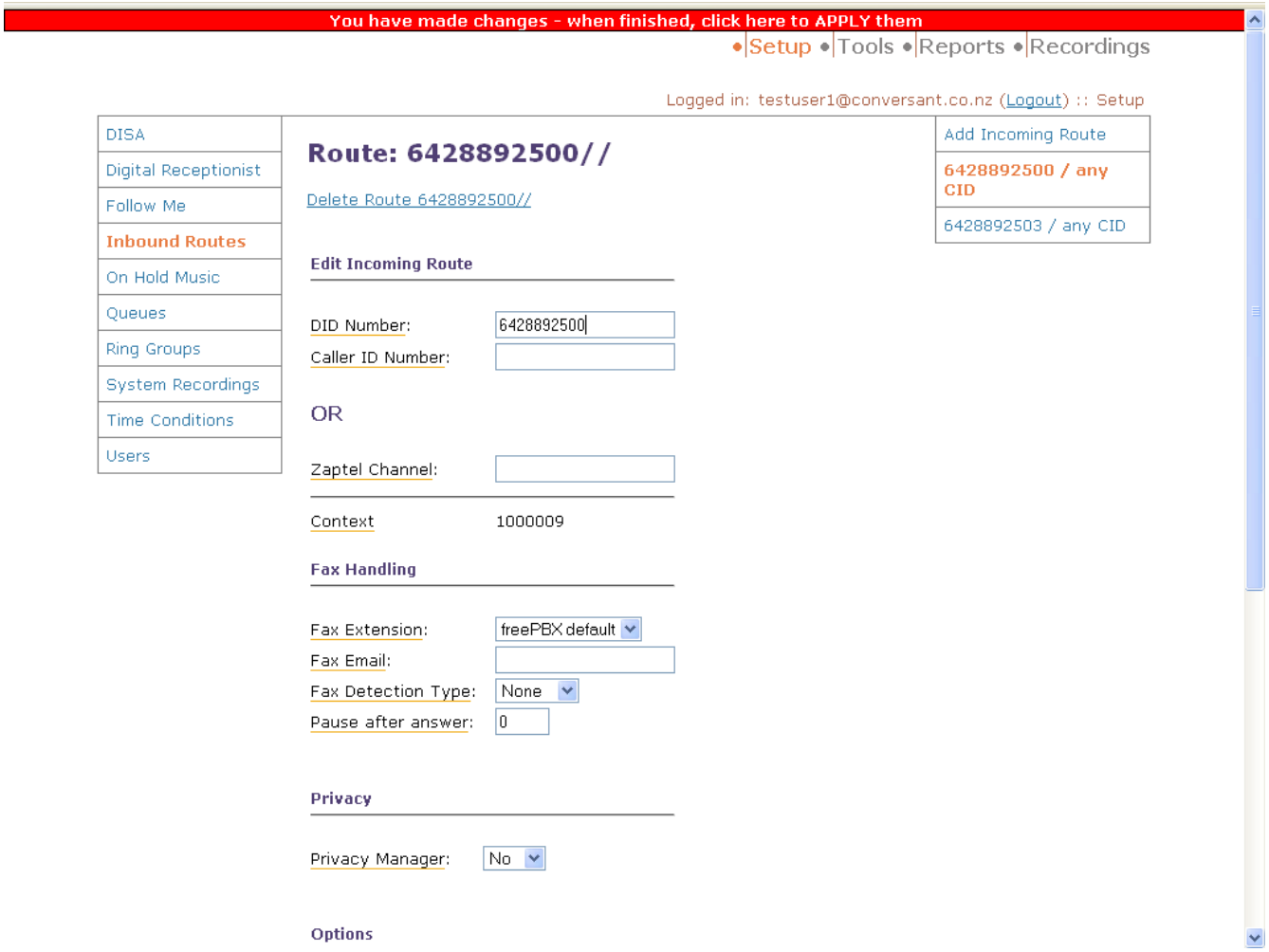
Inbound Route

An inbound route is a destination or originating phone number which reaches your business.

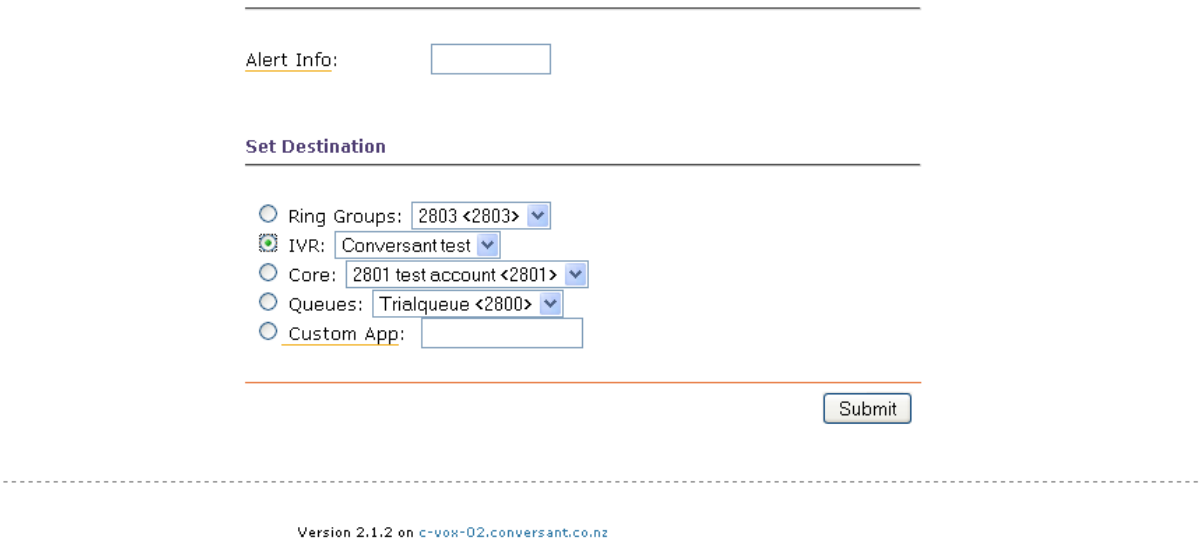
Conversant will set your destination phone numbers for you when you purchase them or move existing ones over to our system. You can also add originating numbers if they require special treatment.

The **Set Destination** section of this menu (very bottom of menu) should be the only area requiring your input in this menu. We strongly recommend you do not change settings in this menu unless you are an advanced user.

Selecting the Inbound Routes option from the left menu will bring up the screen below:



This screen shot is continued on the next page



Moving your cursor over the options under lined in orange will bring up a short description of the field which it corresponding field.

The following is a short description of the fields and other menu options used for modifying inbound routes:

	Delete Route[route #]	Select this option if you wish to remove this number from your phone system and stop callers using it to reach your business.
Edit Incoming Route	DID Number	Will be set by Conversant. Do not modify.
	Caller ID Number	Will be set by Conversant. Do not modify.
	Zaptel Channel	Will be set by Conversant. Do not modify.
Fax Handling	Fax Extensions	Will be set by Conversant. Do not modify.
	Fax Detection Type	Will be set by Conversant. Do not modify.
	Pause after answer	Will be set by Conversant. Do not modify.
Privacy	Privacy manager	Will be set by Conversant. Do not modify.
Options	Alert Info	Will be set by Conversant. Do not modify.
Set Destination	Time Condition	Select this option if you want your system to behave differently at different times. (Note: The time condition must be set up already for this option to appear. Refer Section 2.2.3 Time Condition for more information).
	Ring Groups	Select this option if you wish to direct callers to a ring group that can call a group of people. (Note: A Ring Group must be set up already for this option to appear. Refer to Section 2.2.1 Ring Groups for more information).
	IVR (Digital Receptionist)	If this option is selected, unanswered calls will be looped back into your Digital Receptions main menu. (Note: You will need to have set up a Digital Receptionist up before this option will appear. For more Info refer to Section 2.2.4 Digital Receptionist)
	Core	Select this option if you wish to send callers to voice mail or to go straight to a user's phone. Selecting the voice mail account or user can be done from the drop down menu to the right of this option.

	Queues	Selecting this option will send unanswered calls to a Queue where callers are placed on hold until someone is available to take the call. (Note: To set up a queue or for more information refer to the Queue menu and instructions 2.2.8 Queues).
	Custom App	Do not modify

System Recordings

This is the menu you will use to upload messages you want your callers to hear when they call your business.

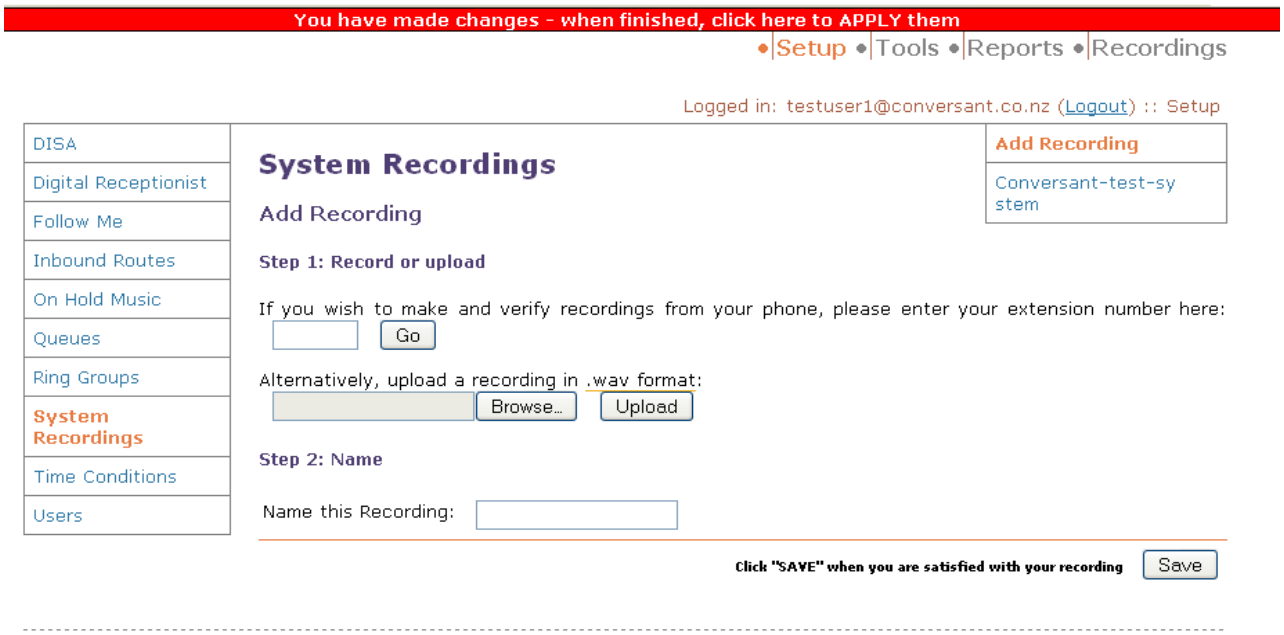
Messages uploaded to System Recordings can either be files recorded on your computer in .wav format and uploaded to the website or, once your phone is connected, you can record your own message directly onto the system using your phone.

To upload .wav file

1. The .wav or Wave file format is Windows' native file format for storing digital audio data. If you need to convert your file to a .wav format, follow this link to a Free .wav converter.
2. Select Browse. This will enable you to browse your computer or network for the desired audio file. Once you have made your selection, select Upload and your selection will appear on the screen similar to the example "The Black Seeds – Cool Me Down.mp3" shown.
3. Enter a name for the recording in the "Name this Recording" box.
4. Click on the Save Button.

To record message from your phone

1. First click on the Systems Recordings option in the left menu. **(Note:** If you wish to upload a message this



way, your system will need to be set up first as you will need to enter your extension number.)

2. Enter your extension number in the field provided and select **GO**
3. Record your message and then hang up.
4. Enter a name for the recording in the "Name this Recording" box.
5. Click on the "Save" Button.

On Hold Music

This menu will allow you to upload music or messages for your callers to listen to while they are on hold. Files may need to be reformatted to .wav before they can be uploaded.

1. The .wav or Wave file format is Windows' native file format for storing digital audio data. If you need to convert your file to a .wav format follow this link to a Free .wav converter.
2. Once you have the desired track loaded onto your computer select the On Hold Music menu option in the left menu. You should see the screen below:

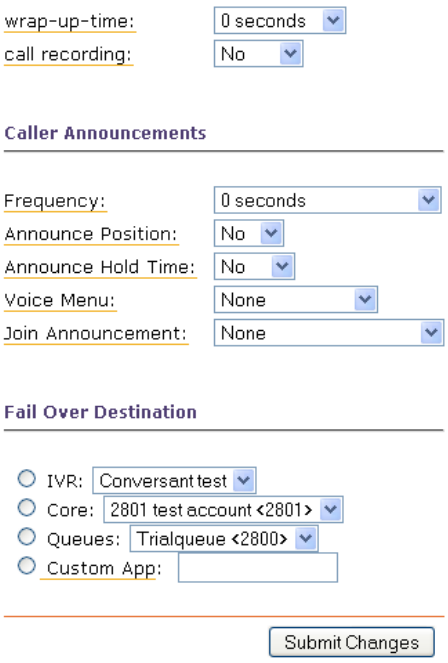
3. Select Browse. This will enable you to browse your computer or network for the desired audio file. Once you have made your selection Select Upload and your selection will appear on the screen similar to the example "The Black Seeds – Cool Me Down.mp3" shown.

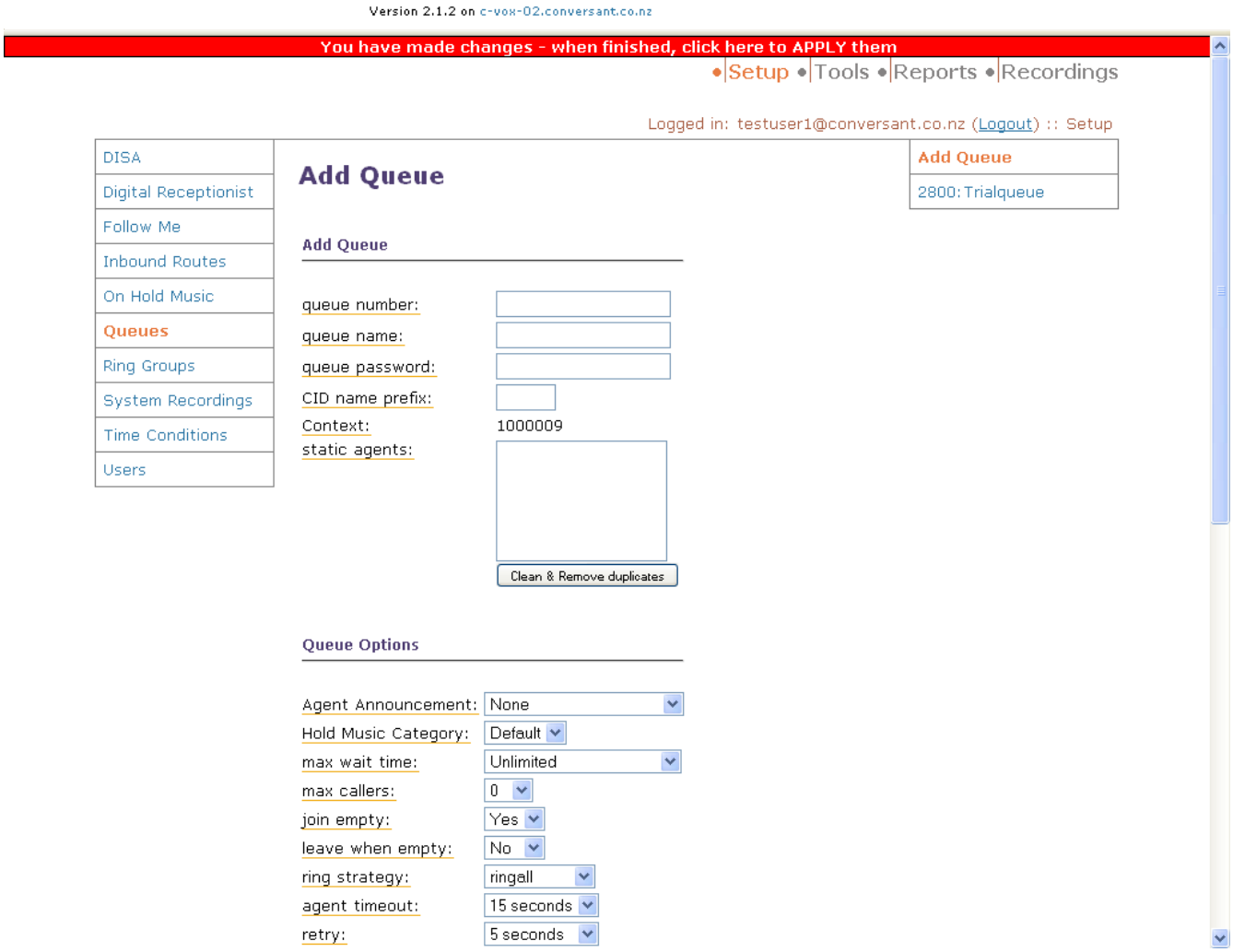
Queues

Queues allow you to create a dynamic pool of people that are able to take calls. When callers are directed to a queue they are placed on hold and then the system tries to connect the call to available "agents". Staff can be permanently assigned to a queue or can log on and log off the queue when appropriate.

Selecting the Queues option from the left menu will bring up the screen shown on the following page.

Moving your cursor over the options underlined in orange will bring up a short description of the corresponding field.





The following is a short description of the fields and other menu options used for modifying Queues:

Add Queue	Queue number	The queue number is the queue's "extension number" in your system. Enter a 4 digit number, which is what users (your employees) will dial to log in or out of the queue.
	Queue name	In this field you can name a queue. This will make it easier to distinguish from other queues. Queues in your system are listed by their extension number and name. E.g. 2800: Trial Queue
	Queue password	This option allows you to create a password for a queue which users (your employees) must enter before being able to take calls from the queue
	CID name prefix	You will not need to edit this field.
	Context	You will not need to edit this field.
	Static agents	This field is similar to the extension list fields in other menus like Follow Me & Ring Groups. The extensions you place in this list will be permanently assigned to the queue and will not be able to sign in or out.
Queue Options	Agent Announcement	This option allows you to play a message to your employees before they receive a call from the Queue they are logged in to. E.g. "This call is coming from customer support". This will need to be uploaded onto System Recordings first.
	Hold Music Category	This option allows you to specify music or other recorded information for callers to hear while they are on hold in the queue. This will need to be uploaded onto System Recordings first.
	Max wait time	This option allows you to set a maximum time that a caller can be on hold in a queue before they are transferred to the Fail Over Destination options. The Fail Over Destination menu is further down the options page. If you do not set this to Unlimited you will need to put settings in Fail Over Destination section.
	Max callers	This option allows you to limit the number of callers who may be in the queue (0 = unlimited) before they are automatically sent to the option you have selected in the fail Over Destination section.
	Join Empty	This option lets you select whether callers can join queues which no users (your employees) are active in.
	Leave when empty	This option allows you to remove callers if no users (employees) are active in the queue. This would happen if, for example, all agents have logged off the queue while the caller was on hold. Callers removed from the queue will be sent to the fall over destination.
	Ring Strategy	This option allows you to choose how calls will be directed to the users (employees taking the calls) who are logged into the queue. There are 5 options available: • Ring all: The system will ring all available users until one answers (default). • Round Robin: The System will ring all available users in sequence. • Least Recent: The system will ring the user who has not received a call from the queue for the longest period of time. • Fewest Calls: The system will ring the user who has received the fewest calls from the queue. • Random: The system will ring a user at random. • R.R Memory: The system will remember where it got to in the last round robin call sequence & start it again from there.
	Agent timeout	This option allows you to set the number of seconds a user's phone will ring for before the system moves the call on to another user. We would suggest no more than 10 seconds.
	Retry	This option allows you to set the number of seconds the system waits after unsuccessfully trying all phones before it tries again.

	Wrap-up-time	This function allows you to set the amount of time a user has between completing a call until the system may potentially send them another one.
	Call recording	This function allows you to record calls made to the queue
Caller Announcements This menu lets you decide what callers hear while waiting in the queue for their call to be answered		
	Frequency	This option allows you to set how frequently announcements will be made to callers waiting in the queue. Setting this to 0 disables announcements.
	Announce Position	This feature allows you to inform callers of their position in the queue.
	Announce Hold Time	This option allows you to inform callers of an estimated wait time.
	Voice Menu	This feature allows you to present a Digital Reception (IVR) menu to callers after they have heard their wait time and queue position. This can allow them to go to voice mail or select another option.
	Join Announcement	This allows you to play an announcement to callers when they first join the queue. E.g. "Thank you for calling Conversant, your call is important to us". This message needs to be uploaded in the System Recordings menu first.
Fail Over Destination This menu allows you to control what happens to callers whose calls are unable to be answered by the queue they are in. They can be sent to any one of the following:		
	Time Condition	Select this option if you want your system to behave differently at different times. (Note: The time condition must be set up for this option to appear. Refer Section 2.3.3 Time Condition for more information).
	Ring Groups	Select this option if you wish to direct callers to a ring group that can call a group of people. (Note: A Ring Group must be set up already for this option to appear. Refer to Section 2.2.1 Ring Groups for more information).
	IVR (Digital Receptionist)	If this option is selected, unanswered calls will be looped back into your Digital Receptions main menu. (Note: You will need to have set up a Digital Receptionist up before this option will appear. For more Info refer to Section 2.2.4 Digital Receptionist)
	Core	Select this option if you wish to send callers to voice mail or to go straight to a user's phone. Selecting the voice mail account or user can be done from the drop down menu to the right of this option.
	Queues	Selecting this option will send unanswered calls to a Queue where callers are placed on hold until someone is available to take the call. (Note: To set up a queue or for more information refer to the Queue menu and instructions 2.2.8 Queues).
	Custom App	Do not modify

2.3 A working example

In this section we will outline a hypothetical business and the process of going from deciding what the PABX should do, through to setting it up. It is important to take the time to think through what you want your system to do before you start setting it up, as time spent doing this at the start will ensure your system functions properly.

Steve and Helen

Steve and Helen currently run a small software company. At present they are working from their mobiles. However this isn't working for them and they would like to present a more professional image to their callers.

Steve and Helen would like to have one general business line which takes the majority of the business calls. They would like to set up a Digital Receptionist to direct calls more effectively. They would also like to offer clients the option of choosing to speak to a sales or support representative. They would like to give more important clients their direct dial numbers. On weekends when they aren't working they would also like the system to play a prerecorded message informing callers that they are not open weekends and indicating their office hours. They also want after hours calls forwarded to Steve's voice mail

Because Steve primarily deals with customers, they would like sales calls to be directed to him. However if he isn't in the office, he would prefer the calls are forwarded to Helen before being sent to his voice mail. Steve lacks Helen's technical knowledge, so they would prefer all support calls to go to her. In the event she isn't in the office they would like the calls to go to her mobile before being sent to voice mail.

As an afterthought, Helen decided she wanted callers to listen to music while they are on hold.

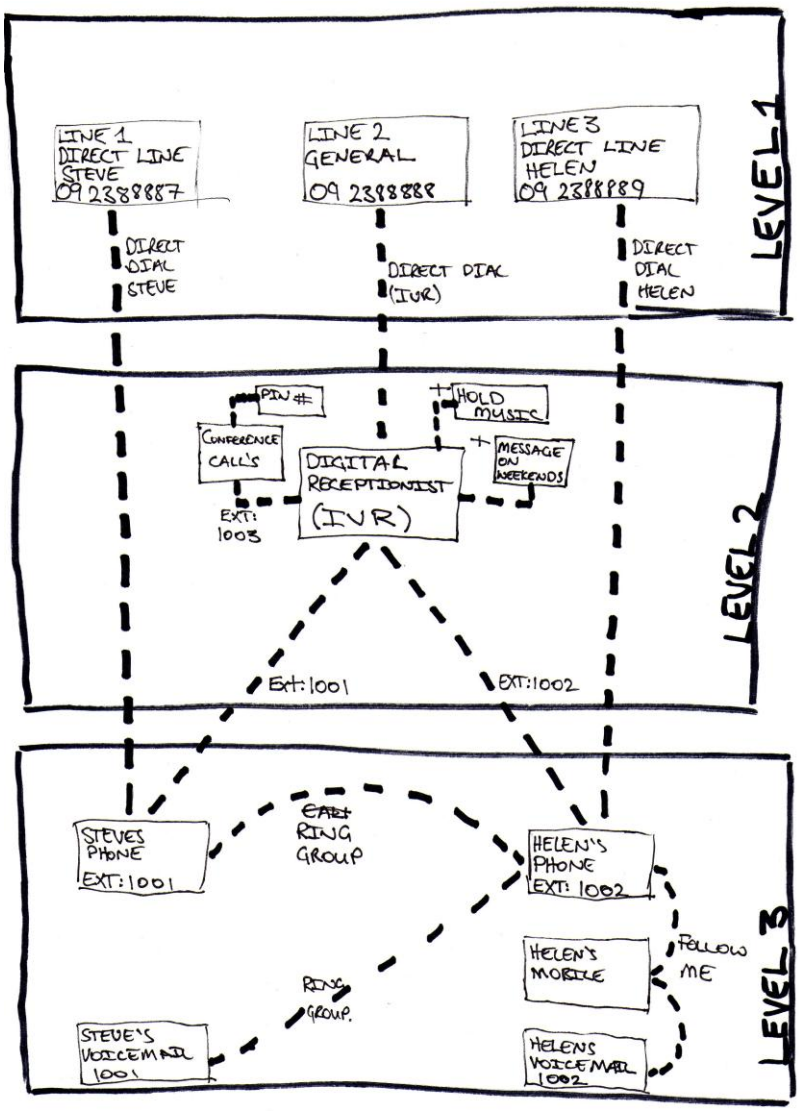
[This scenario may seem complicated, and it is likely when you plan your system it will also seem that way. However approaching your system requirements in the following way will make the process much easier]

Planning the Phone System

In order to plan their phone system properly, Steve and Helen need to plan from the top (or entry point) down. That is, approach the situation from the perspective of an incoming call, and then outline how the calls are to be handled for the different possible situations.

Either use a flow chart to represent your system visually is a helpful way of sorting out what you're after (as shown below) or use our planner tool at the end of this guide (applicable to businesses with a maximum of five inbound lines and 10 phone users). Plan your system in three levels:

1. Where will inbound calls come into your system from (phone numbers)?
2. When an inbound call comes in, how will it be processed by the phone system?
3. Who are in the system (Users) and once a call is in the system what do you want to happen to it?


LINE 1
DIRECT LINE
STEVE
09 2388887
LINE 2
GENERAL
09 2388888
LINE 3
DIRECT LINE
HELEN
09 2388889
LEVEL 1
DIRECT DIAL STEVE
DIRECT DIAL (IVR)
DIRECT DIAL HELEN
PIN #
HOLD MUSIC
CONFERENCE CALL'S
DIGITAL RECEPTIONIST (IVR)
MESSAGE ON WEEKENDS
EXT: 1003
LEVEL 2
Ext: 1001
EXT: 1002
STEVES PHONE
EXT: 1001
EARL RING GROUP
HELEN'S PHONE
EXT: 1002
HELEN'S MOBILE
FOLLOW ME
RING GROUP
STEVE'S VOICEMAIL 1001
HELEN'S VOICEMAIL 1002
LEVEL 3

What do they need?

Having broken down the diagram of the phone system, Steve and Helen can identify the following:

Level 1: "Where inbound calls come from"

They will require three separate lines:

- Line 1 – Steve's DDI
- Line 2 – General business line
- Line 3 - Helen's DDI

Level 2: "How will the calls be processed?"

<u>During Business hours</u>

Lines 1 & 3 will go directly to Steve and Helen and line 2 will go to the Digital Receptionist.

The Digital Receptionist will have 3 options: 1 for Sales, 2 for Support and 3 for Conference calls (which will be password protected.)

<u>Outside Business Hours</u>

General inbound calls will be answered by a prerecorded message regarding business hours, then forwarded to Steve's voice mail.

Level 3: "Who's in the system (users) and how will calls be handled inside the system"

Calls that are directed to Sales or Steve when he is not in the office will need to be forwarded to Helen. In the event she isn't in the office, they will need to be forwarded to Steve's Voice mail. Calls that are directed to Support or Helen however will be forwarded to her mobile phone then on to her voice mail if she does not answer them.

So they will need to set up the phones for each of them, and they will need to set up hold music and time conditions, so that outside business hours a message is played and calls are forwarded to Steve's voice mail instead of putting people through to the Digital Receptionist menu.

Getting Specific

From the information listed above, Helen and Steve will need to set up the following.

Level 1:

- 3 inbound routes or numbers
- Numbers 1 & 3 direct dial to Steve's and Helen's phones
- Number 2 goes to a Digital Receptionist

Level 2:

- A time condition Digital Receptionist (or IVR)
- Instructions for the IVR to do the following
- Forward Sales Calls to Steve
- Forward Support calls to Helen
- Forward Conference calls to the conference call area and request a pin number from users attempting to access that area.
- Play a message to callers outside business hours
- Create a rule that outside business hours, callers hear a recorded message rather than being directed to the reception menu. They are then forwarded to Steve's voice mail
- Upload music for callers to hear while on hold
- Upload a message to play to callers outside business hours

Level 3:

- Set up extensions for Steve and Helen.
- Set up Steve's voice mail
- Set up Helen's voice mail and mobile phone

Setting It Up.

Now that they know specifically what they are after, Steve and Helen can begin setting up the system they require. Unlike designing the system from the top down (or the entry point down) when setting the system up they need to start at the bottom and work up. This is because you need to build the basic components and then combine them to make the rest of the system.

But before they start, they should arrange the numbers they want to use for the business. These numbers can be purchased off Conversant or transferred over from their existing provider. Helen & Steve want the following three numbers.

09 238 8887 - Direct Dial Steve

09 238 8888 - General business number

09 238 8889 - Direct Dial Helen

They will also need to note Helens' mobile number. Now that's done, they will need to work on:

Level Three

a) Set up instructions for calls made to Steve (Section 2.3.2 Follow me)

"Follow me" is the menu where you can specify what happens to unanswered calls directed to a specific Extension / User.

Steve will need to specify what he wants to happen to calls made to his phone that he is unable to answer.

Steve will need to input the following:

- Group Number: 1001
- Group Description: Steve/ Sales
- Ring Strategy: Memory Hunt
- Extension List: 1001, 1002
- CID Name Prefix: This field does not require any input
- Ring Time: 10seconds.
- Announcements: No Entry
- Alert Info: This field does not require any input
- Destination if no answer:

This section of the menu is where you create the settings for handling calls which are not picked up by any of the phones in your call list.

- Select **Core** and choose **Voice Mail 1001** from the drop down menu
- Set up instructions for calls made to Helen (Section 2.3.2 Follow Me)
- "Follow me" is the menu where you can specify what happens to unanswered calls directed to a specific Extension / User.

b) Set up instructions for calls made to Helen (Section 2.3.2 Follow me)

Helen will need to specify what she wants to happen to calls made to her phone in the event she is unable to reach them.

Select Extension 1002 Helen from the menu in the top right of the screen:

- Ring Strategy: Memory Hunt
- Alert Info: This field does not require any input
- Extension List: 1002, 027 435 9870 (Helen's mobile)
- CID Name Prefix: This field does not require any input
- Ring Time: 10seconds.
- Announcements: No Entry
- Destination if no answer:

This section of the menu is where you create the settings for handling calls which are not picked up by any of the phones in your call list.

- Select Core: then choose Voice mail 1002 from the drop down menu.

Level Two:

a) Upload on-hold music (Section 2.3.7 On Hold Music)

Use this menu to upload music or messages for your callers to listen to while they are on hold.

Steve & Helen will need to select some suitable music and upload it in .wav format. Instructions are available in Section 2.3.7 On Hold Music.

b) Upload messages to be played to callers (Section 2.3.6 System Recordings)

This is the menu you will use to upload messages you want you callers to hear when they phone you.

Steve & Helen will need to record a suitable message and upload it in .wav format or once their phones are connected they can record one through their phones.

Instructions for doing this are available in Section 2.3.7 System Recordings

They will record two messages.

First, the message played to people who reach the Digital Receptionist (IVR) during office hours: "*Hello you have reached.....Dial 1 for Sales, Dial 2 for Support or dial # for the Directory"* We will call this recording "**Welcome Message"**

Second, the message to be played outside office hours "*Hello you have reached..... our business hours are 9am to 5pm Monday to Friday. Please hold the line to leave a message".* We will call this recording "**After Hours"**

c) Set up IVR 1 (Section 2.3.4 Digital Receptionist)

Digital Receptionist is the menu where you can set up your automated call answering service similar to the ones used by large corporates:

- Change Name: Steve & Helen IVR 1
- Timeout ('t' option): 10 seconds
- Enable Directory: Tick box
- Directory Context: This is your customer number and requires no changes.
- Enable Direct Dial: Tick box
- Announcements: Select system recordings "Welcome message"
- Increase Options: Do not change
- Save: Select at end
- Decrease Options: Do not change

- Left column: The boxes to the left of the listed options are where you enter the number callers will dial for a certain option. E.g. dial 1 for sales. IMPORTANT- these numbers must match those listed in the announcement played to callers upon reaching the Digital Receptionist.

- Left Box: 1, Select
- Ring Groups: 1001
- Left Box: 2, Select
- RG/ Follow me: 1002 Helen

d) Set up IVR for after hours (Section 2.3.4 Digital Receptionist)

Digital Receptionist is the menu where you can set up your business automated call answering service similar to the ones used by large corporates.

Steve & Helen now need to set up the Digital Receptionist:

- Change Name: Out of hours
- Timeout ('t' option): 10 seconds
- Enable Directory: Tick box
- Directory Context: This is your customer number and requires no changes.
- Enable Direct Dial: Tick box
- Announcements: Select system recordings "Outside office hours message"
- Increase Options: Do not change
- Save: Select at end
- Decrease Options: Do not change
- Left box: The box to the left of the listed options is where you enter the number callers will dial for a certain option. E.g. dial 1 for sales.
- IMPORTANT- these numbers must match those listed in the announcement played to callers upon reaching the Digital Receptionist
- Left Box: 1, Select
- Ring Groups: 1001
- Left Box: 2, Select
- RG/ Follow me: Voice mail 1001 Steve

e) Set up time conditions & message to be played to callers on weekends (Section 2.3.3 Time Conditions)

Time conditions allow you to instruct your system to behave differently within time parameters. E.g. outside business hours, during holidays or during any other time.

- Time Condition name: Normal hours (refer to Section 2.3.3 Time Conditions for advice about naming your time conditions)
- Time to Match
    - Time to Start: 09:00
    - Time to Finish: 17:00

    - Weekday to Start: Monday
    - Weekday to Finish: Friday
- Destination if time matches:
    - Where will your system direct a call which comes in during the time parameters:
    - Select IVR
- IVR: Out of Hours
- Destination if time does not match: Select
- Core: Out of Hours IVR

Level One

Connecting the system to phone numbers (2.3.5 Inbound Routes)

Conversant can set up inbound routes for Steve and Helen, but if they decided to do it themselves, add an originating number or make other changes, this would be how they do it.

Steve and Helen's three inbound routes (phone numbers) will be listed in the menu to the top right of their screen. They will need to select each in turn then direct them to the appropriate destination.

a) Route 1 09 238 8887 - Direct dial Steve

- Edit Incoming Route No Changes
- Fax Handling: No Changes
- Privacy: No Changes
- Options: No Changes
- Set Destination: Select
- Core: Select 1001 Steve from the drop down menu

b) Route 2 09 238 8888 - General business number

- Edit Incoming Route: No Changes
- Fax Handling: No Changes
- Privacy: No Changes
- Options: No Changes
- Set Destination: Select
- IVR: Select Steve & Helen IVR 1 from the drop down menu

c) Route 3 09 238 8889- Direct dial Helen

- Edit Incoming Route: No Changes
- Fax Handling: No Changes
- Privacy: No Changes
- Options: No Changes
- Set Destination: Select
- Core: Select 1002 Helen from the drop down menu

The system is now ready for action.

CONVERSANT PABX SET UP PLANNER

Planning template applicable for up to 5 inbound lines and ten users

LEVEL ONE

Where will Inbound calls come into your system from? Include all inbound phone numbers, DDI's, 0800's, Fax numbers

Line 1	Line 2	Line 3	Line 4	Line 5

LEVEL TWO

Tick applicable option for each ablove listed inbound number. Keep in the relevant column. If IVR indicated, give further instructions in the box below including options for forwarding, on-hold music & messages, conference calling. If Extension number is ticked, give number in the box below. Use the box below to give IVR instructions after hours, including options for after hours message & forwarding.

	During Business Hours.									
	IVR	☐	IVR	☐	IVR	☐	IVR	☐	IVR	☐
Instructions:										
	EXT	☐	EXT	☐	EXT	☐	EXT	☐	EXT	☐
Number:										
	After Business Hours									
	IVR	☐	IVR	☐	IVR	☐	IVR	☐	IVR	☐
Instructions:										
	EXT	☐	EXT	☐	EXT	☐	EXT	☐	EXT	☐
Number:										

LEVEL THREE

Who's in the system (Users) and once a call is in the system what do you want to happen to it?

OPTIONS	EXT #	EXT #	EXT #	EXT #	EXT #	EXT #	EXT #	EXT #	EXT #	EXT #
Group Number										
Group Description										
Ring Strategy										
Extension List										
Ring Time										
Follow-me										